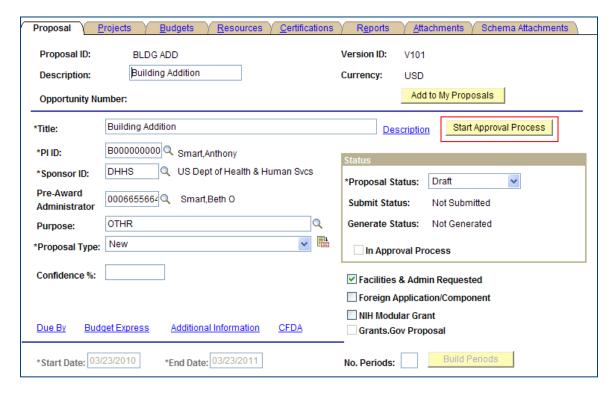- The Principle Investigator and Pre-Award Administrator are the minimum roles required for agencies using workflow
- You cannot use the same PI ID and Pre-Award Administrator, this will cause self-approval of the proposal

- On the Resources tab, you must enter all users involved in the Grants workflow approval process in the Professional section. The PI ID defaults from the Proposal page.
- Also, ensure the Workflow Eligible checkboxes are selected
- If adding one user to multiple roles for the workflow approval process, you must unselect the **Research** checkbox
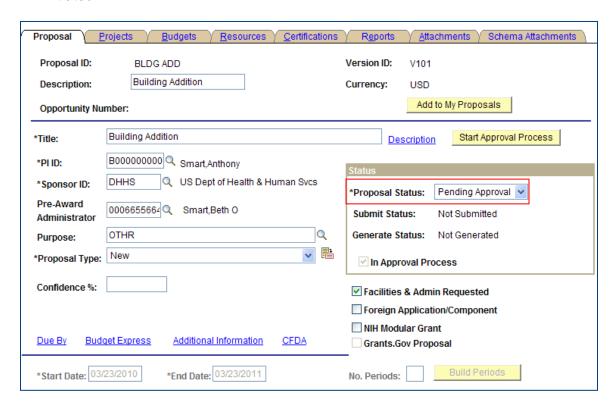

- Once you have entered all required proposal information, go to the **Proposal** page and click the **Start Approval Process** button

- This message will pop-up to ensure you want to begin the workflow approval process; click yes if you are ready to proceed

Are you sure you want to trigger Component Approval Process? (9395,1190)

This will trigger Proposal Component Approval Workflow process.

Yes   No

- The **Proposal Status** changes to **Pending Approval** once the approval process is initiated

- An email notification will then be sent to users listed on the **Resources** tab in the workflow approval process

- Approvers will click the link from the email notification and that will take them into the proposal to review the material
- Once the proposal is reviewed by the user, they will click the **Worklist** link from the main header and approve the proposal
  - o **Note:** Please refer to "Using a Worklist" Job Aid for questions on the using the Worklist